

## CASELINES TIPS AND TRICKS

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[Laurel Family Law LLP](#)


updated: April 12, 2023

1. Use **UPDATE CASE** to get into your matter: it is quicker than REVIEW EVIDENCE and will get you right to the case menu.

**Case List**

**Case Filter:**

Hearing Date From:   Today This Week This Year

Hearing Date To:   Next Day This Month Next Year

Case name / reference:

Show number of cases in case list:

☐ All Words  
☒ Show training cases  
☐ Show closed cases  
☐ Order by Listing Number

Clear Filter Apply Filter

Name	Reference	Listing Number	Next Hearing Date	Last Updated	Created By
* Family Law Training Case	FS-PLACEHOLDER			May 12, 2022 03:24 PM	SCJ - Central East Region - Ontario Superior Court of Justice

Review Evidence Update Case

2. Once into your case, the **INDEX** menu is a great place to start: if you are not in the Bundle that you want to be on, remember you can click on the grey SELECT BUNDLE to move to another bundle.

**Contents**

**Bundle: 02: Motion** Select Bundle

3. The documents in a Bundle will show in the Index. Remember that you are seeing the CURRENT CaseLines page numbering here, instead of the MASTER numbering. You have two options to see a document: Clicking on **VIEW** will open a new Tab (super helpful) and see the document within CaseLines, showing both MASTER and CURRENT numbering:

**View Document**

[View all section documents](#)

**Section:** A: Applicant Documents


**Document:** 0001: Form 15 - Motion to Change

**Date:** December 13, 2021

**Date Loaded:** December 13, 2021 02:19 PM

[Next >](#) [Move](#) [Remove](#) [PDF](#)

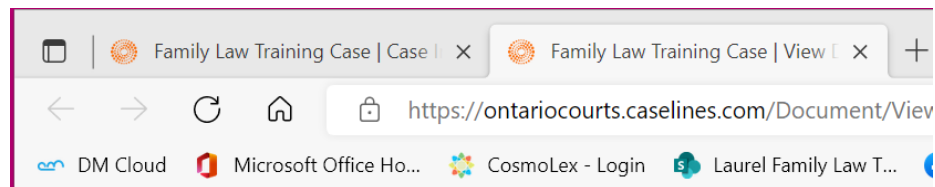
Page 1 of 6: [|<](#) [<<](#) [page 1](#) [>>](#) [>|](#) [Hyperlink](#) [Copy Link](#)


**SEAL**  
**Applicant(s)**

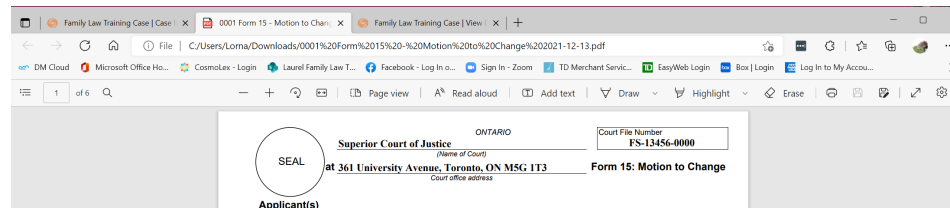
**Superior Court of Justice**  
(Name of Court)  
**at 361 University Avenue, Toronto, ON M5G 1T3**  
Court office address

**Form 15: Motion to Change**  
**Master: A1**  
**Current: A1**

If you want to go back to the INDEX menu, just click on the previous Tab on your browser:



Clicking on PDF will allow you to open the document as a PDF and download on to your desktop if you want, or just view the PDF in the browser:



- From the main case Menu, use **SECTIONS** to upload and rename/reorder documents. Remember you can click on the grey SELECT BUNDLE button once you are in the SECTIONS menu to change bundles if you need to:

Case Home Review Index **Sections** People My Share Group Bundles Search Notes Hyperlinks Upload Transfer

**Family Law Training Case**

**Sections**

Bundle: 02: Motion [Select Bundle](#)

Index	Name	Section Order	Document Ordering	Level
A	Applicant Documents	001		Normal
				<a href="#">View Documents</a> <a href="#">Update All Documents</a>
				<a href="#">View Notes</a> <a href="#">Upload File(s)</a>
B	Respondent Documents	005		Normal
				<a href="#">View Documents</a> <a href="#">Update All Documents</a>
				<a href="#">View Notes</a> <a href="#">Upload File(s)</a>

5. **UPLOADING FILES** is easy. Just determine the party you need to upload files for and then Click **UPLOAD FILE(s)**:

A	Applicant Documents	001	Normal	<a href="#">View Documents</a> <a href="#">Update All Documents</a>
				<a href="#">View Notes</a> <a href="#">Upload File(s)</a>

Then look about half-way down the page to the big empty white space under **SELECT FILES**. You can either Click on files from your desktop and drag them over and dump them in the white space, or you can Click on **ADD FILES** to pick the file you want to upload from your directory/desktop:

**Upload File(s)**

Bundle: 02: Motion [Select Bundle](#)

[Upload File\(s\)](#)
[Upload bookmarked PDF into a single section](#)
[Upload eDiscovery production file](#)

Select Section: A - Applicant Documents

Uploading to Section: A - Applicant Documents

Upload using American date format : ☐

Restricted : ☐

*Please note if a file is restricted it will not display in sub-bundles unless the sub-bundle has been configured to show restricted files. This can be configured in the bundle settings.*

**Select files**  
Add files to the upload queue and click the start button.

Filename	Status	Size
Drag files here.		

[Add Files](#)
[Start Upload](#)
0%
0 kb

[Update All Documents](#)
[View Section Documents](#)

Once you have your file/files sitting in the SELECT FILES white space, Click on **START UPLOAD**. You will know the file uploaded if you see 100% in the status column beside the file:

Select files  
Add files to the upload queue and click the start button.

Filename	Status	Size
Factum - Respondent H. Harold - 18-JUN-2021.pdf	100%	360 kb

Add Files
Start Upload

100% 360 kb

**bonus tip:** CaseLines does not like files over 500 pages!

- Re-naming and re-ordering documents is next. If you are in your UPLOAD FILES(S) screen, Click **UPDATE ALL DOCUMENTS** just below the white SELECT files space:

Update All Documents

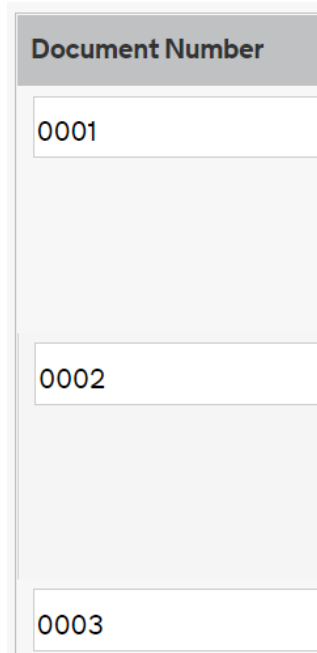
View Section Documents

Here is where the fun starts! You can do a lot of great organizing in the UPDATE ALL DOCUMENTS screen.

To change the **DOCUMENT TITLE** or **DOCUMENT DATE** just Click and type. Don't worry if the field is kind of greyed out. As soon as you Click there it will turn white and let you type. If you have used the naming protocol that the Court has instituted you shouldn't have to make any changes but this is your opportunity to ensure that it is done property, especially the document date (if you don't use the naming protocol your document may upload with the date at the time you upload, instead of the date on the document).

To change the order in which the document will show on the INDEX, Click in the **DOCUMENT NUMBER** field and change the number. Keep a 4-digit protocol, but otherwise change the numbering as you wish. CaseLines numbers documents by the sequence of uploading, so if you want your Notice of Motion to show up before

your Affidavit, but you uploaded your Affidavit first, just change the Notice of Motion DOCUMENT NUMBER from 0002 to 0001 and change the Affidavit DOCUMENT NUMBER from 0001 to 0002:



The screenshot shows a vertical list of document entries. At the top is a grey header bar with the text "Document Number". Below this are three white input fields, each containing a document number. The first field contains "0001", the second contains "0002", and the third contains "0003". The fields are separated by light grey background blocks.

**bonus tip:** if there is a document I want the presiding judge to find quickly in a bundle, I number it 0000. That way it is always at the top. You can number as many documents as you want 0000. For trials, I like the Opening Trial Statement and the Draft/Proposed Order to both be 0000 in the Trial Documents Bundle, for example.

**bonus tip:** if are not in the UPLOAD FILE(S) window when you decide you want to change the DOCUMENT NAME or DOCUMENT DATE or DOCUMENT NUMBER, you can get there from the **SECTIONS** menu. Once you are in the SECTIONS window, Click **UPDATE ALL DOCUMENTS** and you will be there!



A dark grey button with rounded corners and a white border. The text "Update All Documents" is written in white, sans-serif font.

There is no "save" feature when you re-name or re-order your documents, so don't look for it! Feeling worried that all of your good work didn't stick? No problem. After you are done, Click the **INDEX** menu to check that the documents are re-named/re-ordered as you want.

Case Home Review Index Sections People My Share Group Bundles Search Notes Hyperlinks Upload Transfer

### Family Law Training Case

Update All Documents

A: Applicant Documents **Documents**

Click on an entry to edit. Changes are saved automatically.

Document Number	Document Title	Document Date	
0001	Form 15 - Motion to Change	December 13, 2021	Included: <input checked="" type="checkbox"/> View Inserted: <input type="checkbox"/> Tabbed: <input type="checkbox"/> Restricted: <input type="checkbox"/>

View Move PDF Remove

Case Home Review **Index** Sections People My Share Group Bundles Search Notes Hyperlinks Upload Transfer

### Family Law Training Case

Reference FS-PLACEHOLDER

Category General

Description

#### Contents

**Bundle: 02: Motion** **Select Bundle**

A: **Applicant Documents** (4 documents, 68 pages, 0 minutes)

Document Number	Document Title	Document Date	Bundle	View	PDF	S	T
0001	Form 15 - Motion to Change	December 13, 2021	1:A1 - A6	View	PDF		
0002	Form 35.1 - Affidavit in Support of Claim for Custody or Access (Beyonce)	December 03, 2021	2:A7 - A14	View	PDF		
0003	Factum - Respondent H. Harold -	June 18, 2021	3:A15 - A41	View	PDF	S	T
0004	Factum - Respondent H. Harold -	June 18, 2021	4:A42 - A68	View	PDF	S	T

7. The **PEOPLE** menu is a great place to go to see who your Judge may be. You may see a big, long list of participants in your cases. It is usually the Trial Coordinators, judicial assistants and MAG staff at a courthouse who need access. But if you press **CTRL + F** on your keyboard in this screen, a little FIND menu will pop up. Type in Judge and press ENTER. You should find all of the Judges assigned to your matter. If you have had other appearances, the Judges who heard those appearances will also still likely show up.
8. Some of lawyers prefer preparing for appearances without having to scroll through documents on CaseLines but want the page number references. It is easy to do this through the **BUNDLES** Tab:

Home Invite Lists View Case List View Hearings Support Case name / ref

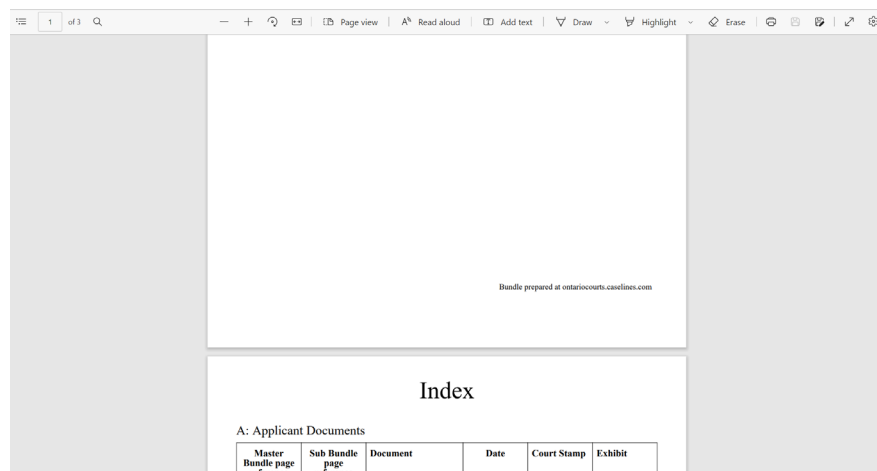
Case Home Review Index Sections People My Share Group **Bundles** Search Notes Hyperlinks Upload Transfer

Once you are in the BUNDLES menu, find the Bundle you want to download and Click **DOWNLOAD** on the right hand side of the screen. Now you have some decisions to make. Do you want to download the COMPLETE BUNDLE or the BUNDLE INDEX. Even if I don't want the COMPLETE BUNDLE I always want the BUNDLE INDEX on my desktop as a great quick reference point. Click on **DOWNLOAD BUNDLE INDEX** to start:

02 : MOTION - MAY 26, 2022

Front Page Index	Bundle Parts PDF	Secure Sharing
Document Indexes: <input checked="" type="checkbox"/>	Download Complete Bundle (28.0 Mb)	Secure Sharing
Page Numbers: <input checked="" type="checkbox"/>	Download Bundle Index (50 Kb)	
Consecutive Numbering: <input checked="" type="checkbox"/>	Download 001 A1 to A27 (2.8 Mb)	
Inserts Only: <input type="checkbox"/>	Download 002 B1 to B94 (27.8 Mb)	
<input type="button" value="Web"/> <input type="button" value="Word"/> <input type="button" value="CSV"/>	<input type="button" value="Page Map CSV"/>	

The BUNDLE INDEX will pop up as a PDF to download in your browser. I use Microsoft Edge as my browser. If you Click on Open File below the Index the PDF will open in a new Tab. You can then Click Save to save the BUNDLE INDEX to your desktop:



**bonus tip:** do NOT panic when you see the first page blank. This is (annoyingly) how the download always generates. Scroll to the second page and you will see

the Index. Once you download to your desktop you can use the ORGANIZE PAGES menu in AdobeDC Pro to delete that first page.

The great thing about the BUNDLE INDEX is that it will give you the MASTER and CURRENT page numbering as well as the DOCUMENT NAME and DATE:

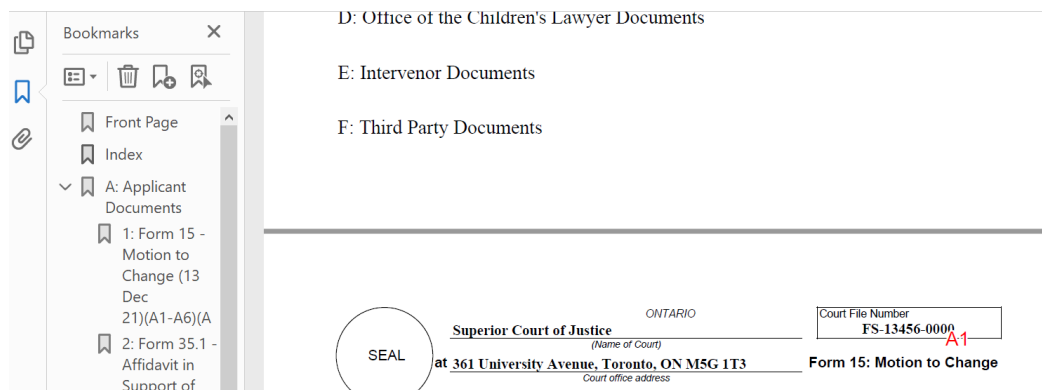
## Index

### A: Applicant Documents

Master Bundle page reference	Sub Bundle page reference	Document	Date	Court Stamp	Exhibit
A1 - A6	A1 - A6	Form 15 - Motion to Change	December 13, 2021		
A7 - A14	A7 - A14	Form 35.1 - Affidavit in Support of Claim for Custody or Access (Beyonce)	December 03, 2021		
A15 - A41	A15 - A41	Factum - Respondent H. Harold -	June 18, 2021		

If you want the entire bundle of documents uploaded for an appearance, Click on **DOWNLOAD COMPLETE BUNDLE** from the Bundled menu. Just like the DOWNLOAD INDEX option, you will see a blank first page once you open or save the COMPLETE BUNDLE, so don't worry!

With this option, you get the INDEX and you also get all of the DOCUMENTS. The CaseLines MASTER numbering will be on each page of the documents in red, and if you want to move around the bundle with a bit more ease you can Click on the BOOKMARKS Tab on the left-hand side of the screen to quickly access each document:





9. Working on a Factum and want hyperlinks to a document on CaseLines? Easy-peasy! From the **INDEX** menu, click on VIEW beside the document you want to hyperlink:

**View Document**

[View all section documents](#)

Section: A: Applicant Documents

Document: 0001: Form 15- Motion to Change

Date: December 13, 2021

Date Loaded: December 13, 2021 02:19 PM

[Next >](#) [Move](#) [Remove](#) [PDF](#)

Page 1 of 6: [|<](#) [<<](#) [page 1](#) [>>](#) [>|](#) [Hyperlink](#) [Copy Link](#)

SEAL

ONTARIO

Superior Court of Justice  
(Name of Court)

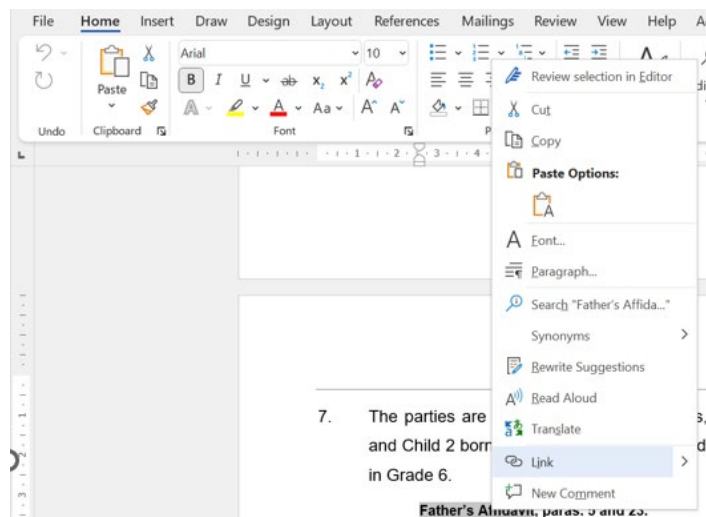
at 361 University Avenue, Toronto, ON M5G 1T3  
Court office address

Court File Number **Master: A1**  
FS-13456-0000 **Current: A1**

Form 15: Motion to Change

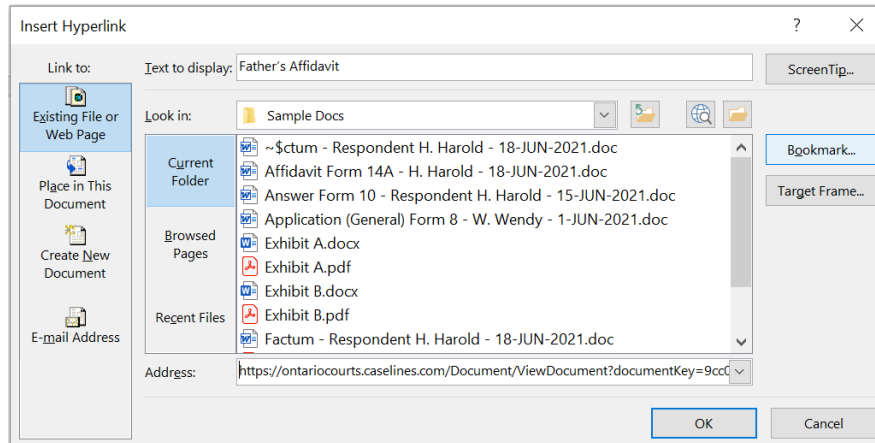
Now Click **COPY LINK** just above the document. A pop up will appear, asking you to copy the link to the Windows clipboard by pressing CTRL + C on your keyboard. If the link is blue, go ahead and press CTRL + C. If it is not blue, click in the field and highlight the entire link and then press CTRL + C. Once you have done this, Click OK.

Now go into your Factum. I like doing this in Word. Highlight the area you want hyperlinked (so if you have copied the Affidavit, find the place in your Factum where you have referred to the Affidavit and click to highlight the Affidavit reference. Once highlighted, Right-Click on your mouse to access the menu:



Select LINK.

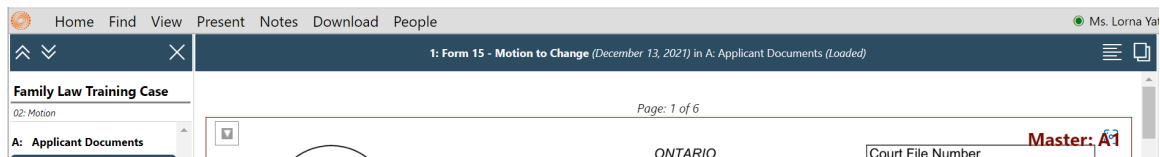
Your cursor should default to the ADDRESS field at the bottom of this LINK window. If it does, just press CTRL + V on your keyboard or Right-Click and select PASTE to paste the link that you copied from CaseLines into the ADDRESS field.



Press OK.

Ta-dum! The reference to the Affidavit should now be blue. You can press CTRL and then Click on the link to test it out. You should be taken into CaseLines to the Affidavit you linked. Consider how helpful this is for the judge.

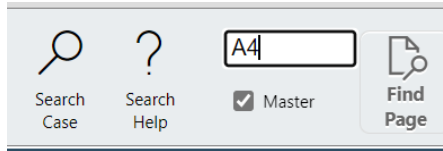
10. CaseLines has a pretty good FIND menu to help you find pages or words in a document or even the entire bundle. From the case menu, select **REVIEW**. A new Tab will open in your browser (**tip:** you don't have to ever worry about getting back to the main case menu – just close the Tab or click on the previous Tab to go back to the case menu). You will have a new menu in the REVIEW screen. Click on FIND from this new menu:



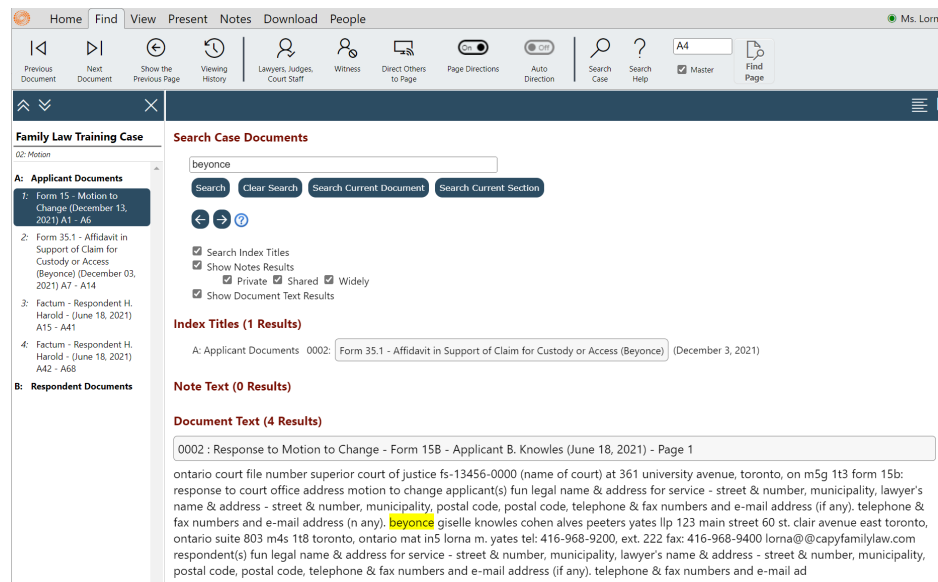
To find a page in a bundle, select **FIND PAGE** on the far right-hand side of this FIND menu:



Ensure there is a checkmark beside MASTER. Now just type in the page you are looking for and press ENTER on your keyboard. CaseLines will take you right to that page.



If you want to look through the case to find a word or reference in a hurry, press **SEARCH CASE** from the FIND menu. From this window, you can type in a word or reference and select SEARCH (**tip:** you can restrict the search to just the document you are in or the bundle, as opposed to searching all documents uploaded in your matter):



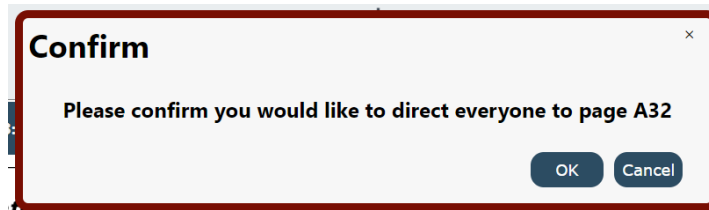
From here, you can see all references to the term you searched with a synopsis below each reference. To go into the document, click on the grey reference (if you hover your mouse over the reference the colour should turn burgundy). Once in the document, the term that was searched will be highlighted:

#### Applicant(s)

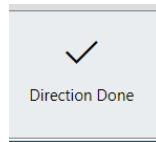
Full legal name & address for service — street  
postal code, telephone & fax numbers and e-m.

**Beyoncé Giselle Knowles**  
123 Main Street  
Toronto, Ontario  
M4S 1T8

11. A great way to take your presiding judge to a specific page when you are making submissions is to use the **DIRECT OTHERS TO PAGE** feature in the FIND menu. Once you are on the page you want to take the judge and your friend/the SRL to, Click to select DIRECT OTHERS TO PAGE. A pop up will appear, asking you to confirm that you want to take everyone to the particular page:

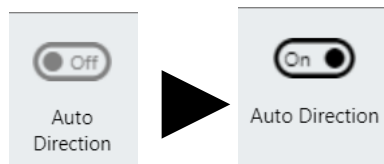


Press OK. Everyone logged into CaseLines on your matter will then be taken to that page. You will know that this worked if you look back up to the FIND menu. The DIRECT OTHERS TO PAGE option will be temporarily re-named to DIRECTION DONE with a checkmark:



After you have directed others to the selected page you everyone on the case will be free to move around as they please.

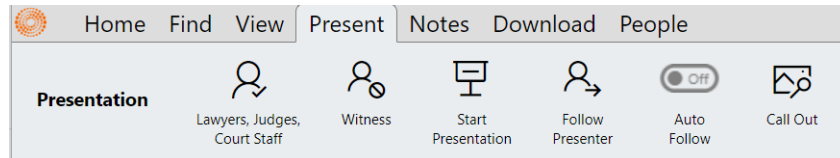
If I am in a trial, I like to remind those involved in the trial to go to the FIND menu at the beginning of each day and turn the AUTO DIRECTION function on. This will avoid receiving confirmation messages like the one above multiple times during the day:



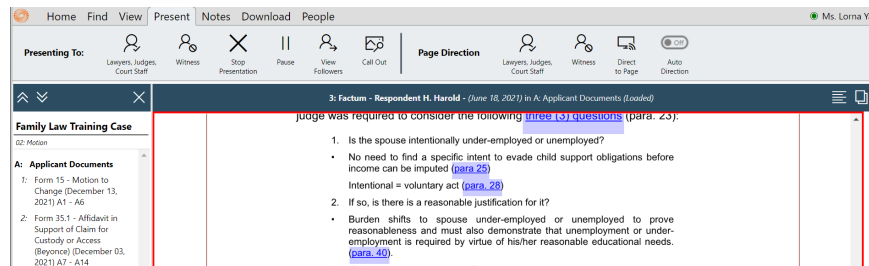
bonus tip: you can only direct people to pages in the bundle that they are in. So if you are in Trial Documents and you want to direct those on CaseLines to a document in the Orders/Endorsements bundle, you need to move to that bundle first, before directing to a page in that bundle.

12. Notwithstanding my love of Zoom, I now use CaseLines if I want to share my screen during an appearance and the DIRECT OTHERS TO PAGE option is not enough and I want to control the screen and move around between documents, for example.

From the REVIEW menu, select **PRESENT**:




Now select START PRESENTATION. You will see a red border around any documents you move through. You are now controlling everyone's CaseLines experience. You can PAUSE or STOP PRESENTATION any time:



This works the same way as the share screen function on Zoom, so most of you will be familiar with it. Be mindful that it is a bit invasive, however, so use the PRESENT option sparingly and try to use DIRECT OTHERS TO PAGE as to your default.

13. Asking your Judge to look two documents, side by side, can be incredibly persuasive. I like it in particular when I comparing expert reports for the Trial Judge. It may also work well if there are competing chronologies or other competing documents with common content where there are key differences you want to point out.

Here is how you can view multiple documents in CasLines at the same time:

1. From the Review screen, select the first document. On the far right hand side of the document, in the header (usually dark blue, and where the document name and location is set out), press the DUAL PANES  icon.

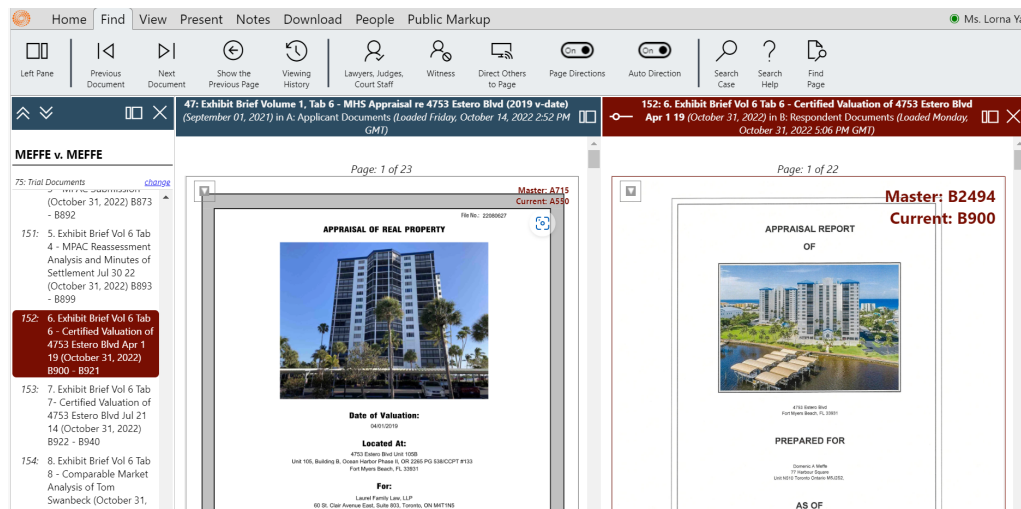
2. A new reading window will appear with a red header. Now you want to make sure that you can move to a new document and the new document will show on the right. To do this, you need to look to the far left of your header bar, almost at the left hand side of the screen:




3. If you hover your mouse over the ACTIVE PANE icon just to the left of the X, you will see a message. If it says "Selections will appear in the left hand document pane" you will want to CLICK once to change it so that your next selected document will appear in the RIGHT hand document pane.



4. Now scroll down the Index on the left hand side of your screen and CLICK select the document you want to appear on the right hand side. Ta dum – your screen might now look like this:



5. When you are done, you can go back to a single document view just by clicking the X on the right hand side of the document on the right - .

bonus tip: you can't use Direct Others or Present when you have two documents side by side – this is a CaseLines deficiency that I hope will be addressed at some point.

14. Hyperlinking within CaseLines: hyperlinking within CaseLines can be helpful if you have uploaded a document that refers to other documents that are up on CaseLines or if you have an affidavit with a few exhibits and you want to upload those exhibits separately and hyperlink the exhibits to the affidavit. Here is a step by step using the exhibit example:

1. Go into your Case Home.
2. From the **INDEX** menu, click on VIEW beside the document you want to add a hyperlink to

**Section:** B: Respondent Documents

**Document:** 0004: Affidavit Form 14A (reply) - Applicant S. Street

**Date:** December 13, 2022

**Date Loaded:** October 13, 2022 08:47 AM

[< Previous](#)
[Next >](#)
[Move](#)
[Remove](#)
[PDF](#)

Hyperlink

**Superior Court of Justice**

(Name of Court)

**at 361 University Avenue, Toronto, ON M5G 1T3**

(Court office address)

ONTARIO

**Master: B45**

**Current: B43**

**Form 14A: Affidavit (General)**

**dated .....**

**Applicant(s)**

Full legal name & address for service — street & number, municipality, postal code, telephone & fax numbers and e-mail address (if any).

**WENDY**

Lawyer's name & address — street & number, municipality, postal code, telephone & fax numbers and e-mail address (if any).

**COHEN ALVES PEETERS YATES LLP**

**60 St. Clair Avenue East**

**Suite 803**

**Toronto, Ontario M4T 1N5**

**LORNA M. YATES**

**Tel: 416-968-9200, ext. 222**

**Fax: 416-968-9400**

**lorna@capyfamilylaw.com**

**Respondent(s)**

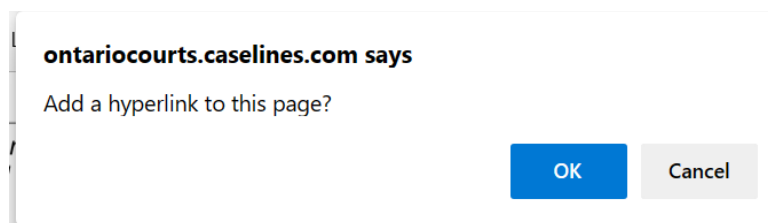
Full legal name & address for service — street & number, municipality, postal code, telephone & fax numbers and e-mail address (if any).

**HAROLD**

Lawyer's name & address — street & number, municipality, postal code, telephone & fax numbers and e-mail address (if any).

**PROGRESSIVE BARRISTERS**

3. At the top of the document you will see a Hyperlink button. Click to select this option.
4. Place your mouse on top of the Exhibit "A" reference in your affidavit and click. You should see a pop up now.



5. Click OK to add a hyperlink where you clicked.
6. You should now see a "Edit Hyperlink" window. There should be a default beside the Hyperlink Type so Document Page. If that is there, you are good.

A window titled "Edit Hyperlink" with a dark header bar containing a close button. The window has a white background. It contains several sections: "Hyperlink Type:" with two radio buttons, "Document Page" (selected) and "Web Site"; "Description:" with an empty text box; "Section:" with a dropdown menu showing "Please Choose ..."; "Document:" with the text "Please choose a section ..."; and "Page:" with the text "Please choose a section ...". At the bottom right, there are "Save" and "Cancel" buttons.

7. Next you have to add a Description. In this example, I would just type "Exhibit "A"".

The same "Edit Hyperlink" window as before, but now the "Description:" text box contains the text "Exhibit "A"". The cursor is at the end of the text.



- Now look at the Section option and choose whether you are the Applicant or the Respondent. In this example, I am going to be the Respondent, so I click to select Respondent.

*Section:*

B: Respondent Documents ▾

- The next step is selecting the Document you want to hyperlink. This should be easy. Click on the drop down menu and select "Exhibit A" in this example.

*Document:*

0007: Exhibit A ▾

- Click on Save to complete this process.

**Edit Hyperlink** ✕

*Hyperlink Type:*

☒ Document Page  
☐ Web Site

*Description:*

Exhibit "A"

*Section:*

B: Respondent Documents ▾

*Document:*

0007: Exhibit A ▾

*Page:*

1 ▾

Save Cancel

- You should now have a super ugly hyperlink reference to Exhibit "A" that is purple (at least in my settings). If you want to move it around a week bit, just click and drag (sometimes I do this so that the hyperlink doesn't cover the typing).

- Home Find View Present Notes Download People Public Markup Ms. Lorna Yates | Eastern S

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Family Law Training Case

02: Motion change  
2023(3) A1/U - A194  
21: Tab 4 M (D) v M (S) - new brunswick (January 23, 2023) A195 - A222  
22: Tab 5 2012onsc3597 - Teefer (tit for tat) (January 23, 2023) A223 - A225  
23: Tab 6 Thomas v Osika (January 23, 2023) A226 - A239

B: Respondent Documents
  - : Draft Order (in Word) (June 18, 2021) B1 - B2
  - : Opening Trial Statement (April 30, 2022) B3
  - 1: Notice of Motion (June 18, 2021) B4 - B30
  - 2: Affidavit Form 14A (J. Jack) - Respondent H. Harold (June 18, 2021) B31 - B38
  - 3: Affidavit Form 14A - Applicant S. Street (December 05, 2022) B39 - B42
  - 4: Affidavit Form 14A (reply) - Applicant S. Street (December 14, 2022) B43
  - 5: Factum (December 05, 2022) B44 - B45
  - 6: Affidavit Form 14A - H. Harold (hyperlinked) (June 18, 2021) B46 - B47
  - 7: Exhibit A (February 27, 2023) B48

6: Affidavit Form 14A - H. Harold (hyperlinked) (June 18, 2021) in B: Respondent Documents (Loaded Monday, February 27, 2023 3:30 PM GMT)

SCOTT BYERS  
Tel: 1-800-816-8335 ext. 2  
Fax: 647-417-7190  
scott@Progressive.Law

My name is  
(Full legal name)  
I live in  
(municipality and province)

WENDY  
  
the City of Toronto, Province of Ontario

and I swear/affirm that the following is true:  
*Set out the statements of fact in consecutively numbered paragraphs. Where possible, each numbered paragraph should consist of one complete sentence and be limited to a particular statement of fact. If you learned a fact from someone else, you must give that person's name and state that you believe that fact to be true.*

1. blab la ba.  
2. blab la ba. A copy of this paystub is attached as Exhibit "A" to this affidavit....  
3.

Put a line through any blank space on this page.

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Page: 2 of 2

Form 14A: Affidavit (General) (page 2)

Court File Number Master: B49 Current: B47